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ABSTRACT

There is widespread consensus worldwide that improving the performance of education systems is necessary to advance socioeconomic development, reduce inequality, enhance economic competitiveness of nations, and possibly fortify governmental institutions. This paper explores the political conditions that may enhance or hinder the adoption of education reforms. It relies on existing studies of reform adoption to extract hypotheses that seem applicable in some cases and testable in others. The paper argues that the political conditions for the adoption of quality-oriented education reforms remain unfavorable, despite a new impetus in favor of reform. Quality reforms produce concentrated costs and distributed benefits, leading to the rise of strong veto groups, such as teachers' unions, bureaucrats, and university students. Beneficiaries of education reform do exist, but they tend to be less organized and motivated than reform opponents. Successful reform adoption is contingent on addressing the concentration of costs on a few actors, low incidence of policy entrepreneurship, political disengagement of potential beneficiaries, and political advantages of cost-bearing groups. This paper discusses various hypotheses about ways to address each of these hurdles. Appendix 1 illustrates changes in ministers of education and ministers of finance in selected cases of education reform. (Contains 90 references.) (RT)

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The Politics of Education Reform: Bolstering the Supply and Demand; Overcoming Institutional Blocks

Javier Corrales

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About the Author

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Executive Summary

This paper explores the political conditions that may enhance or hinder the adoption of education reforms. It does not offer definite, statistically tested conclusions. Instead, this paper relies on existing studies of reform adoption to extract hypotheses that seem applicable in some cases and testable in others. This paper should be read more as a review of the literature and a guide to future research than as an endorsement of specific recommendations.

At the outset, it is argued that the political conditions for the adoption of quality-oriented education reforms remain unfavorable, despite a new impetus in favor of reform. Quality reforms produce concentrated costs and distributed benefits, leading to the rise of strong veto groups (e.g., teachers' unions, bureaucrats and university students). Often, these veto groups are highly organized, resourceful and well connected to political parties, thereby magnifying their capacity to contest the reforms. Beneficiaries of education reform do exist, but they tend to be less organized and motivated than reform opponents. A common antidote to these problems—policy entrepreneurs—is theoretically possible, but still less likely due to shortcomings in the system of incentives and penalties that governments face in the area of education reform.

Successful reform adoption is thus contingent on addressing the following political hurdles: 1) concentration of costs on a few actors; 2) low incidence of policy entrepreneurship (i.e., shortcomings in the supply side of reform); 3) political disengagement of potential beneficiaries (i.e., shortcomings in the demand side); and 4) political advantages of cost-bearing groups. This paper discusses various hypotheses, often raised explicitly or indirectly by existing studies, about ways to address each of these hurdles. These are summarized in Table I. The discussion of each hypothesis begins with a brief statement about why, at least in theory, the proposed hypothesis might have a causal impact on the chances of reform adoption. Next, examples from one or more cases are provided to illustrate the viability of the hypothesis. Finally, caveats about the validity of the hypotheses are presented.

Table I:
Conditions that May Enhance Education Reform Adoption

Changes in Reform Type:

- Combining access elements with quality reform
  Corollary: Political compensation of those adversely affected by reform may be more important than material compensation
- Following an incremental rather than all-encompassing approach
- Packaging education reforms with other type of reforms (of the state or the economy)

Efforts to Bolster the Supply Side:

- Entrusting education reforms to ministries with low turnover rates
- Increasing links with the outside world or global economy
- Creating independent pro-reform advisory councils

Efforts to Bolster the Demand Side:

- Launching massive information dissemination campaigns
- Involving potential beneficiaries in reform design and evaluation
- In cases of decentralization, granting greater financial autonomy to local entities

Institutional Setting Determinants of Societal Cooperation with Reforms:

- Teachers' union (or any cost-bearing group) links with opposition political parties hinder government-union cooperation
  Corollary: Improving executive-legislative relations on the issue of education reform moderates union opposition.
- Internal union fragmentation hinders union-government cooperation; external union fragmentation diminishes the power of unions
- Preempting strategic coalitions between cost-bearing groups and other societal actors

Introduction

There is widespread consensus worldwide that improving the performance of education systems is necessary to advance socioeconomic development, reduce inequality, enhance the economic competitiveness of nations and possibly fortify governmental institutions. Nevertheless, meaningful education reforms often fail to get approved or implemented, mostly for political reasons.

What are some of these political obstacles? This paper summarizes recent scholarship on the political hurdles that education reforms tend to encounter. It also identifies theoretically informed hypotheses based on recent successes and failures of reform.[1]

The paper is divided into two parts. Part 1 discusses the prevalence of political impediments to reform, despite recent increase in domestic and international pressure urging education reform. Part 2 shows that in a significant number of cases, there has been successful adoption of education reforms, suggesting that political obstacles are not insurmountable. It also discusses hypotheses about the political conditions under which education reforms are more likely to be approved. The main argument of this paper is that reforms are more likely to flourish if the following political obstacles are addressed: 1) concentration of cost and diffusion of benefits; 2) deficient ministerial commitment levels (i.e., bolstering the supply side); 3) insufficient societal demand for reform (i.e., bolstering the demand side); and 4) institutional features that magnify the power of veto groups.

[1] For purposes of this paper, success is defined in political (rather than technical) terms, i.e., whether the reforms become politically accepted, following either legislative approval or an explicit pact among recognized actors. This definition expresses little about whether the reforms achieve their intended educational objectives, e.g., improving student and teacher performances.

Part 1

The Obstacles to Education Reform

In the 1990s, education reform has emerged as a seemingly top-priority political issue in both developed and developing countries. Improving the quality of education has become associated with two highly cherished goals of modern states. First, improving the quality of education is increasingly seen as a source of international economic competitiveness. In a global economy, countries compete with one another for markets, foreign investment, technological development and hosting of multinationals (see Strange 1992). A highly educated workforce is deemed to confer an edge in this economic competition.

Second, high quality education has become synonymous with self-sustained domestic development, not just international competitiveness. Since the 1970s, the mantra of education specialists has been that improving education is a necessary precondition for higher living standards. However, governments seldom listened. Instead, they treated education more as a social right or entitlement, which they provide to citizens depending on the extent of their social commitment, fiscal resources, or inclination to use the educational system as a mechanism of political co-optation. Today, this attitude is changing. Rather than viewing education only a social obligation of the state, governments have begun to see it as a necessary catalyst for development. In 1993, the World Bank concluded that a crucial factor in the economic success of East Asia from the 1970s to the 1990s was investment in human capital, especially through well-targeted educational investments. Many governments are finally taking this conclusion seriously.

In addition to this growing consensus on the link between education reform and the economic interests of nations, external pressure for education reform reached a new high in the 1990s. Multilateral lending institutions now customarily include education reform as part of their package of economic and state reforms (Carnoy 1995). Education reform is considered a fundamental axis of the "second stage" of reforms, i.e., the next step after achieving economic stabilization and liberalization (see World Bank 1996:123-131; Naim 1995).[2] In Latin America, for instance, Puryear (1997) identifies an array of external forces

[2] See also Ginsburg (1991:12-20) for a discussion of how world system pressures either have encouraged or stifled education reform efforts.

pushing for reform: the need to compete in a global economy; the availability of new ideas about the negative economic effects of inefficient education; and the greater salience of international institutions such as development banks, bilateral aid agencies, non-governmental organizations (NGOs) and consulting firms. In the 1998 Summit of the Americas, where all heads of state and government of the Western Hemisphere gathered, improvement of education emerged as the top agenda item.

Finally, education has become a top priority for both the political right and left in many countries. Advocates of market economics concede that education, which promises to make labor markets more competitive, remains a legitimate area for state action. Advocates of state involvement in the economy value educational reform as an opportunity to produce progressive results. Although their views on strategy differ—the political right advocates greater school choice whereas the political left supports more inclusionary state intervention (see Plank and Boyd 1994)—there is universal consensus on the need to make schools more accountable.

In sum, education reform in the 1990s has enjoyed a new impetus in policy circles, both domestically and internationally, and across different ideologies.

Three Impediments to Reform

Despite this renewed impetus, approving and implementing education reforms remain as politically difficult as ever. Political obstacles continue to paralyze and distort well-devised reform initiatives. To grasp the probability of education reform adoption, it is imperative to understand three common obstacles.

Concentrated Costs, Diffused Benefits

A useful starting point for studying the political difficulties associated with education reform is a cost-benefit analysis. Scholars argue that when the costs of a particular policy fall directly and intensely on specific interest groups, and its benefits are too diffuse, policy adoption is politically difficult. For instance, Wilson (1973), using Olsonian logic, argues that policies vary according to the extent to which their costs and benefits are either distributed or concentrated (Table 1). The more a policy generates concentrated costs, i.e., when the costs are limited to a small number of citizens or organized groups, the more difficult the adoption. This is because negatively affected interest groups have a much stronger incentive to block the reforms than beneficiaries have to support them. For ex-

ample, imposing increased safety standards on automobiles produces enormous concentrated costs on automobile makers, whereas the benefits are diffuse, i.e., spread over many citizens and organizations. Consequently, the politics surrounding this policy option will feature an oversupply of veto groups and an under-supply of reform demanders.

Table 1: Policy Type, According to Costs and Benefits		
	Distributed Costs	Concentrated Costs
Distributed Benefits	Raising taxes to fund social security	Safety requirements on automobiles **Quality education reforms**
Concentrated Benefits	Grant subsidies to farmers **Access education reforms**	Allowing a few (rather than all) airlines the right to service a particular market

Education reforms can be analyzed using Wilson's (1973) matrix. Generally, two broad types of educational reforms exist: **access** reforms and **quality** reforms. Access reforms call for increasing the availability of educational programs and opportunities. These reforms normally involve investment to increase the numbers of schools, classrooms, teachers, teachers' salaries and teaching supplies. Access reforms are commonly understood as expanding the coverage of the education system. In this paper, however, "access reforms" are construed more broadly, as any time additional resources are invested in the education system so that the "reforms" produce gains for some or all parties and losses for very few actors, if any.

Quality reforms, on the other hand, involve efforts to improve the efficiency of invested resources, with the goal of improving the academic performance of students, increasing teacher productivity, reducing student drop-out or repetition rates, achieving optimum teacher/student ratios, penalizing teachers' inadequate performance, granting greater autonomy to school boards, etc. (see World Bank 1995; Savedoff 1998). The definition of "quality reforms" used in this paper implies real or perceived losses for some stakeholders, in sharp contrast to access reforms (as defined here) in which parties mostly gain.

In Wilson's (1973) matrix, access reforms exemplify policies that generate concentrated benefits and diffused costs, and quality reforms are the mirror image. The beneficiaries of access reforms include enrolled students and parents, teachers and teachers' unions, construction companies/builders and bureaucrats whose budgets increase. At the same time, the costs of access reforms are spread across a wide group (taxpayers). Quality reforms, on the other hand, generate diffused benefits and concentrated costs. Society at

large and incumbent politicians draw some benefits (e.g., a more educated society), but these benefits are too general, spread across a large number of actors, and mostly perceptible in the long term. On their own, beneficiaries are unlikely to turn into powerful champions for reform. In addition, beneficiaries who are better positioned to make political demands—the middle sectors[3]—often have exit possibilities, such as private schools and private tutoring, which lessen their propensity to demand reforms.[4]

Cost-bearers, on the other hand, create huge stirs. They include unions that lose privileges and non-accountability; bureaucrats in the central government who give up decision-making authority; students (especially at the university level) who lose subsidies or free services; providers of school supplies and textbooks who lose contracts as a result of curriculum reforms; education officials who must accept the embarrassment associated with recognizing failings in the system; political parties who might lose the capacity to disburse patronage through the educational system; and the local elite who will confront new local rivals as a result of decentralization (see Crouch and Healey 1997:I-3). Almost by definition, systemic reforms such as the decentralization of education entail distributing costs and reallocating power among these groups (see Kemmerer 1994).

Moreover, those who may be adversely affected by education reforms—potential "losers"—are usually politically competent to combat proposed reforms. Teachers' unions, for instance, tend to be highly centralized and well organized, which allows them to resolve collective action problems more easily. In addition, they often operate in a monopsony (i.e., they face a single employer—the central government) and thus a single contract (Hausmann 1994:179). Teachers' unions thus have a strong allure. Teachers are more likely than workers in other sectors to join a union, which magnifies the political power of teachers' unions.

In sum, Wilson's (1973) cost-benefit/interest group analysis points to several political problems. Quality reforms generate concentrated losers, who are likely to organize effectively to block reforms. While beneficiaries exist, they have fewer incentives to mount a sufficiently strong demand for reform to defeat the campaigns of potential losers.

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[3] In the 1950s and 1960s, modernization theorists argued that the middle sectors were better positioned than other sectors of society to place demands on governments; they had both material incentives and political resources. In the 1980s and 1990s, middle sectors proved to be serious societal challengers of austerity measures (Nelson 1990).

[4] I am grateful to Yasuhiko Matsuda for bringing this to my attention.

Less Powerful and Low Incidence of Policy Entrepreneurship in Education

A common solution to the problems associated with policies that produce concentrated costs and diffused benefits is what Wilson (1986) labels "policy entrepreneurs." These are actors, usually at the cabinet level or with close links to the president, who find a way of pulling together a legislative majority on behalf of interests not well represented in government. Policy entrepreneurs "dramatize an issue, galvanize public opinion, and mobilize congressional support" for policies that would not otherwise be approved (Wilson 1986:440).

In the 1990s, governments have appointed powerful ministers of finance eager to wage difficult political battles on behalf of unpopular economic reforms, often known as "technopols." (Dominguez 1997; Williamson and Haggard 1994). How likely is it that comparable policy entrepreneurs will emerge in the education sector? The evidence so far indicates: not likely. Reform czars are not as common in education as they are in economics. Even when they do emerge, their powers are not as sweeping. This is because the rise of policy entrepreneurs depends on government commitment, which, despite the new drive towards education reform, continues to falter.[5] As Part 1 shows, governments pursuing education reforms simply do not face sufficient incentives to persevere with quality reforms, or high enough penalties for abandoning their commitment.

Education Reform vs. Economic Reform

In the last 20 years, many developing countries have adopted politically difficult market-oriented and structural adjustment reforms. Why have countries been more willing to absorb the political costs of economic reforms than of education reforms? Part of the answer is that quality education reforms, unlike macroeconomic adjustments, do not provide immediate, tangible political gains to governments. When countries address serious macroeconomic problems (e.g., high inflation), the results are often visible within months, thus permitting politicians to capitalize on these accomplishments in the near term. In contrast,

[5] There are notable exceptions. In the mid-1980s, Jordan's King Hussein became directly involved in his country's education reform, even entrusting the Crown Prince as the principal overseer of quality reforms (Berryman 1997). In New Zealand, the Prime Minister (Lange) took over the education ministry and appointed a reform specialist (Ballard) to lead the implementation (Perris 1997). In El Salvador, by inviting presidential candidates to participate in various fora to discuss the reforms, reform advocates succeeded in making education reform a primary issue in the 1994 presidential elections (Reimers 1997a). In Brazil, in order to signal governmental commitment, Paulo Renato Souza, the Minister of Education during the first administration of Fernando Henrique Cardoso (1994-1998), became the first cabinet member to be re-appointed during Cardoso's second administration (1998-2002).

many benefits of improved education are imperceptible in the short term. Incumbent politicians are more likely to wage political battles that offer immediate rather than long-term political rewards (see Geddes 1994). As such, they are more likely to devote attention to macroeconomic adjustment than to education. This gap between the immediate electoral concerns of politicians and the long-term results of education reform undermines government commitment to the issue of education.

Moreover, many governments traditionally relied on educational systems as mechanisms for political co-optation. Teaching positions are often treated as a form of employment of last resort, very often in compensation for some type of political favor. Mexico is a good example. Following the 1968 massacre of students, the Mexican government attempted to alleviate student discontent by launching a massive expansion of the education sector.[6] During the "lost decade" of the 1980s, as standards of living declined, the government almost doubled the membership in the main teachers' union, the Sindicato Nacional de Trabajadores de la Educación (SNTE), from 548,355 members in 1978 to close to 1 million in 1989 (see Torres 1991). There is no question that the expansion of education in Mexico in the 1970s—which covered all three levels, not just the university system—was a response to unmet demand. In 1978, for instance, approximately 3 million children lacked access to primary schools. However, it is difficult to deny that with this expansion of spending and union size the state intended to score political points among the urban middle class, a sector in which the ruling party was deemed to be losing electoral steam. This unionization allowed the government to shelter segments of the population from the impact of economic adversity. Quality education reforms jeopardize the capacity of governments to use the bureaucracy for these types of political purposes.

Moreover, although external pressures for education reform are at an all-time high, they are still weaker than pressures for economic reform. This is because there are no hard and immediate sanctioning mechanisms for non-compliance. For instance, multilateral institutions extend credit contingent on achievement of macroeconomic and fiscal objectives, thus pressuring governments to persevere in economic reforms. In addition, erosion of macroeconomic fundamentals can trigger capital outflows—a type of international sanction for unsound economic policy. It is difficult to find similar sanctions for non-delivery of

[6] The National Autonomous University of Mexico (UNAM) was enlarged: full-time professors increased from 5,770 in 1970 to 30,000 in 1980; the student body grew by 78.3 percent in 1972-1985; and the academic staff grew by 159.1 percent. In addition, SNTE, the main teachers' union, became one of the largest bureaucracies in the country, gathering the bulk of the rank-and-file membership in the Federation of State Employees, which in turn is linked to the popular sector of the ruling party (see Torres 1991).

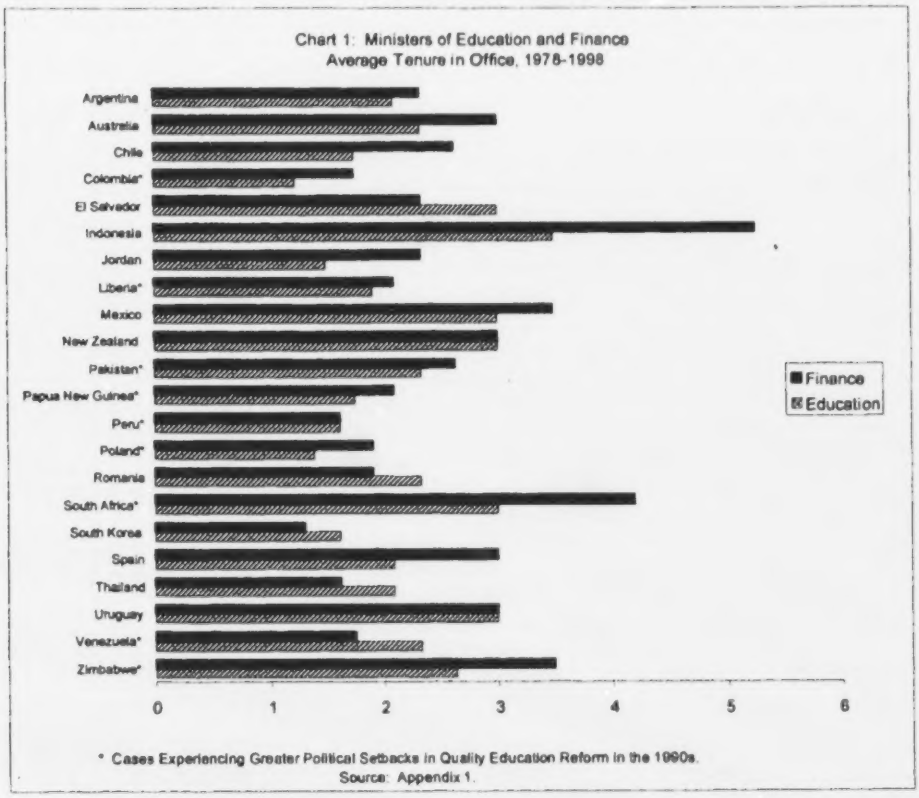
quality education. Loan conditionality is seldom stipulated on the basis of stringent education reform accomplishments. Investors and lenders do not leave a country, at least in the short and medium term, simply because governments postpone their promise to enhance education.

This is not to say that governments face no incentives to adopt a pro-reform agenda. On the contrary, a pro-reform discourse scores popularity points for governments, particularly today when education reform enjoys so much prestige. States thus have a lot to gain by "appearing to implement" quality educational reforms (Weiler 1994:45; Ginsburg et al. 1991). And while some ministers of education have been able to capitalize on their reform achievements,[7] the costs of faltering on that commitment—or of delivering less than was promised—is not as high as in other areas of reform. The result is often empty rhetoric; lofty reform goals are announced but there is little commitment to implementation.

Implication 1: Instability and Short Tenure at the Ministry Level

Evidence of weak policy entrepreneurship in the area of education may be found in the high turnover rates in ministries of education. Because heads of government are disinclined to engage in education reform battles, they will use the ministry of education for alternative political purposes: to reward political supporters, to "park" political allies whom they wish to promote, to compensate opposition parties, etc. The result is high turnover rates in ministerial positions (see Chart 1). Appendix 1 lists the ministers of education and ministers of economy/finance from 21 countries in various regions of the world that launched education reform in the 1980s and 1990s, and that are mentioned throughout this paper. Some of these reforms advanced politically (Argentina, Australia, Chile, El Salvador, Jordan, Indonesia, Mexico, New Zealand, Romania, South Korea, Spain and Uruguay), while others stumbled (Colombia, Liberia, Pakistan, Papua New Guinea, Peru, Poland, South Africa, Venezuela and Zimbabwe), as discussed later in the paper.

[7] For instance, the Mexican President, Ernesto Zedillo (1994-2000), advanced politically after serving as the minister of education under President Carlos Salinas de Gortari (1988-1994). The current presidential candidate of the ruling coalition in Chile, Ricardo Lagos, was also minister of education in the early 1990s.



Three observations emerge:

- There is a high turnover rate in the ministries of education; in most cases, the average tenure in office is less than 2.5 years.

- In most cases, the average tenure in office is lower for ministers of education than for ministers of finance.

- Most exceptions to the above correlate with quality reforms in education (e.g., Argentina, El Salvador, New Zealand, Romania and South Korea).

These results are inconclusive given the sample size. However, they are compatible with the argument that, despite the new impetus for education reform, shortcomings are common in the supply side in general and in comparison with the macroeconomic policy domain in particular. (The extent to which the higher turnover rate is a significant independent variable of deep reform is a more complicated issue discussed later in this paper.)

Implication 2: Different Bargaining Power between Ministers and Teachers' Unions

The weakness in the supply side has implications: it diminishes the government's bargaining power and its capacity to counterbalance reform opponents. This becomes evident by comparing the incentives and constraints facing politicians who head ministries of education with those of politicians who head teachers' unions. High ministerial turnover means that education ministers, even those who would like to initiate sound quality reforms, have relatively shorter terms of office (Hausmann 1994). Insofar as ministers expect shorter tenures and quick moves to alternative political posts, they are less inclined to persevere with costly and unpopular reforms, preferring conflict avoidance solutions instead. One result is a preference for yielding to pressures from below.

Teachers' unions, on the other hand, are often led by professional politicians who make their careers in union activism. Compared to most ministers of education, leaders of teachers' unions have longer "tenure" (see Inter-American Development Bank 1996:257, 192-294). Moreover, leaders of teachers' unions tend to come from leftist parties, which place a premium on challenging the state. For a leftist leader, conducting a successful fight against the state constitutes a positive career move, in sharp contrast with ministers of education, for whom completing the term in office in peace is an optimal career move. Thus, labor leaders have incentives to provoke conflict, whereas education ministers face incentives to avoid it.

Teachers' unions also have more advantages in challenging the state than unions in other sectors. The weapon available to teachers' unions—strikes—is highly discriminating: it creates enormous costs for the government, the intended target, but relatively few disruptions to the rest of society. This contrasts sharply with strikes in other sectors such as utility services, health and transportation sectors. For instance, when the workers of a utility service, such as a water supply company, go on strike, they hurt the government, but also society at large, which is indiscriminately inconvenienced by the lack of running water. When nurses strike, they punish the government, but they also punish innocent patients. When transportation workers strike, they also inconvenience every commuting citizen in the country. However, when teachers go on strike, the number of innocent citizens inconvenienced is minimal. Students stay at home, which is an inconvenience mainly for households that lack the capacity to supervise children during the day (and in developing countries, where multiple family members often reside in the same dwelling, this might be

a small number of households). Thus, teachers' unions can challenge the government for a long time with less chance of losing public support than strikers in many other sectors.[8] The magnetism and high levels of organization of teachers' unions, their discriminating weapon against the government (e.g., strikes), together with a union leadership with a reduced tenure in office, career alternatives and no aversion to conflict, explain their political power.

Decentralization: The Mixed and Insincere Motives of States

The likelihood of many quality reforms to entail some form of decentralization raises a whole new set of political difficulties. Decentralization involves the transfer of decision-making authority for planning, management and use of resources from higher levels of government (central authorities) to outer or lower tiers such as provinces, municipalities, local councils and even school boards (see Rondinelli et al. 1989; Rondinelli 1981). Although many governments have embarked on decentralization projects since the late 1970s, their commitments to the presumed objectives of decentralization is often dubious. As Weiler (1990) shows, the three main arguments for advancing decentralization—redistributing power, enhancing the efficiency of public services and improving learning—conflict directly with the inherent interest of states to centralize authority. This clash between the inherent interest of states and the inherent goals of decentralization complicates the politics of reform adoption through at least three mechanisms.

First, government commitment to decentralization is liable to be insincere or at least motivated by the wrong reasons. Weiler argues that governments pursue decentralization mostly for "compensatory legitimation," i.e., to regain legitimacy among the electorate whenever this legitimacy is faltering, and for "conflict avoidance," i.e., whenever central governments face heightened conflicts that they cannot resolve, and hence, seek to transfer them to other entities. Others argue that governments decentralize only when they lack information about how best to allocate resources (e.g., de Groot 1988). Yet others claim that governments pursue decentralization simply to favor one political group over another, leading to unnecessary internal bickering and incoherent policies (McGinn and Street 1986). Absent these conditions, governments lose interest in decentralization and may even attempt to undercut or reverse the decentralization process.

[8] For a similar analysis, using differing cost-impacts and bargaining powers of affected interest groups to explain the greater extent of decentralization in health than education in Venezuela, see González (1998).

Second, the commitment of mid-level bureaucrats, the very same actors in charge of decentralizing, may be questionable. Decentralization challenges the power and authority of these bureaucrats (Rondinelli et al. 1989). In addition, bureaucrats may be a source of inertia because the leadership in bureaucracies often does not place a premium on individual initiative. Bureaucrats are expected to follow orders and procedures, but they are seldom rewarded for learning, initiating reforms and solving problems (Berryman 1997). For these reasons, professional bureaucrats often stand as formidable obstacles to reform.

Third, the faltering commitment of central government actors, especially mid-level bureaucrats, gives rise to an unexpected pathology in the implementation of decentralization: it turns potential beneficiaries such as local entities into adversaries of decentralization. Local organs are often thought of as potential beneficiaries of decentralization, which frees them from central control and grants them new prerogatives (Bird and Wallich 1994:123). However, local organs are not unambiguous beneficiaries of decentralization. Even when carried out with the right intentions, decentralization comes with strings attached and new responsibilities (e.g., provision of new services). Thus, local organs may be conditional, rather than whole-hearted, supporters of decentralization; they welcome decentralization provided they obtain financial autonomy to carry out these new responsibilities (Bird and Wallich 1994).

Central bureaucrats are well positioned to exploit the fragility of local-level support for decentralization. By denying local organs financial resources and autonomy, they can easily quell this support. Without financial autonomy, local organs lose interest in new responsibilities, becoming opponents rather than demanders, of decentralization.

In Venezuela and Colombia in the 1980s, and in Liberia and Zimbabwe in the 1990s, central bureaucrats became lethal reform adversaries by refusing to grant financial resources to local organs, thereby destroying local-level enthusiasm for decentralization (see Hanson 1989:44; Fiske 1996:18-19). In Zimbabwe, local councils argued that without financial autonomy, they would not accept the responsibility of building new schools. In Liberia, an internationally supported plan to devolve authority to county and district offices also floundered. Local organs received new offices and staff, but they never received the authority to hire, fire and transfer teachers, nor to open, close or even certify schools. More important, they received no operating budget or means to raise funds (Kemmerer 1994). In Venezuela, while all governments between 1969 and 1988 proclaimed decentralization of education, regional officials were never actually delegated the authority to manage budgets

(Hanson 1989). In Colombia, municipalities ultimately opposed decentralization, because it would have entailed a greater financial burden—the cost of providing education (Carnoy and Castro 1997).

Part 2

Overcoming Obstacles to Reform

The main problem with the analysis in Part 1, which is based solely on cost-benefit impact, the powers and incidence of policy entrepreneurs and the mixed motives of central authorities, is that it overstates its case: it over-predicts reform paralysis. The empirical evidence in the last 20 years contradicts this pessimistic prediction. Numerous cases of quality reform have been approved and implemented throughout the world. Table 2 provides recent examples. While none of the cited cases is complete or perfect, and some entail more meaningful reforms than others, all entail significant changes in the overall structure of the education sector that challenged vested interests of crucial political actors.

Table 2: Examples of Relatively Successful Implementation of Quality-based Education Reforms

Argentina (1991-present)	The government decentralized the basic education system. Provinces and the municipality of Buenos Aires took over responsibility for schools, leading to a ministry "without schools." Spending on basic education was re-structured: in 1988, the government spent 0.63 percent of the GDP, and the provinces spent 1.78 percent. By 1993 the figures changed to 0.05 and 2.30 percent, respectively. The government also introduced curriculum revisions, extended compulsory schooling from 7 to 10 years and created new tests to measure student academic attainment (see García de Fanelli 1997).
Australia (1987-mid 1990s)	Reforms made the education system more market oriented (e.g., private universities were established). In some provinces, public schools received site-based management, schools and principals became more accountable, funding followed students, the size and authority of the central bureaucracy was reduced, and school councils and principals gained more authority (see Pascoe and Pascoe 1997).
Chile (1990-present)	A major efficiency-oriented reform (including deep decentralization, school autonomy, student-based funding and subsidized private schools), initiated in 1981 under an authoritarian regime, was for the most part preserved by a center-left coalition government after the transition to democracy in 1990 (see Espínola 1997) and complemented with significant quality-oriented reforms (longer school day, training, support networks and performance incentives for teachers); and targeted support for schools in low-income and rural areas (see Delannoy 2000).
El Salvador (1991-present)	The government implemented deep decentralization, including granting parents greater control over school governance. Funds were transferred to Community Education Associations, which were in charge of hiring and firing teachers and school directors, and determining teachers' salaries and hiring decisions, providing and administering social security systems for teachers, and maintaining buildings, among other things (Ministry of Education 1997).

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Jordan (1985-mid 1990s)	In 1985, after several years of following a narrow step-by-step reform, the government launched a far-reaching reform package (Berryman 1997). There were increases in mandatory school years, new methods of assessing student performance and sweeping reforms of the curriculum in favor of a core education for both academically inclined and vocationally inclined students (Haddad 1994:98).
Mexico (1990s)	Funding has shifted from higher education (the norm throughout Latin America) toward the needier basic education. Funding for higher education has been reallocated in favor of innovative programs and research incentives (whereas basic operational subsidies have been kept to a minimum) (see Kent 1997). A sweeping decentralization law was approved (see Schmelkes 1997), and new performance incentives for teachers were introduced.
New Zealand (1987-mid 1990s)	A market-oriented and heavily decentralized approach was adopted. Schools became "self-managed" by boards that include elected parents and which are allowed to employ non-union members as teachers. Budget authority passed to the schools, which procure privately most services formerly provided by the Ministry of Education. Funding follows students in a transparent manner. The ministry has been streamlined, and now focuses on holding schools accountable for outcomes, rather than controlling or delivering inputs.
Romania (1990-present)	In the first stage (1990-1991), the government achieved the de-communization of the curriculum, de-linked the system from the Communist Party, introduced new academic standards and diversified secondary education. In the second stage (1993-1997), the government liberalized education markets and established assessment tests administered by a specialized agency outside the Ministry of Education (Birzea 1994; Birzea 1996).
Spain (1980s)	The government carried out deep decentralization of education, especially at the university level. Local councils (groups consisting of principals, teachers, city officials and parents) were established and granted considerable authority, including hiring and firing principals, designing school activities and approving budgets submitted by the ministry of education. (Hanson 1990). A series of access and quality reforms were approved in the late 1980s.
South Korea (1980s-present)	After successfully completing a program of education expansion, the government turned to quality reforms. In 1994, more than 80 quality-oriented reforms were instituted (e.g., enhancement of primary and secondary education, encouraging autonomous decision-making for admission to higher education and establishment of vocational training centers). As of 1998, almost 70 percent of these reforms were under implementation (Moon 1998).
Thailand (1970s-1980s and late 1990s)	In the 1970s, diversified education was introduced, under which the existing vocational schools became diversified and secondary schools and the teacher training cycle at upper secondary level were to be phased out. School fees were increased sharply. Curriculum was revised to reduce disparities in quality among regions and to include basic academic training with practical skills (see Haddad 1994). In a new set of sweeping, quality-oriented reforms in 1999, compulsory schooling was extended to 12 years; the curriculum was modernized to stress math, science and English; control over teacher hiring, firing and development was decentralized to the provinces; and the Ministry of Education was streamlined.
Uruguay (early 1990s)	Access reforms were initiated at the pre-school level, and quality reforms were introduced at the secondary level. Secondary-level teachers were retrained.

The above illustrative cases were not randomly selected. However, they represent many regions of the world and various levels of educational and economic development. They show that deep, systemic, quality-oriented reforms are politically feasible, refuting some common notions about political impediments to reform. For instance, reforms can occur in both democratic (New Zealand) and non-democratic (Jordan) settings, under center-left (Spain) and center-right (South Korea) governments, and in new democracies (Romania) as well as old ones (Australia). They can occur simultaneously with sweeping packages of state and economic reform (Argentina), or in isolation (Uruguay). Reforms also can occur under the direction of the same political party that in the past tried but failed to reform (Mexico), or they can survive despite a change in political regimes (Chile). Finally, reforms can occur in countries emerging from violence and polarization (El Salvador).

The analysis in Part 1 fails to predict these cases of reform because its focus is too narrow. Concentrating exclusively on a cost-benefit analysis of interest group politics, or on the low probability of policy entrepreneurship in the supply side leaves unexplored the many strategies that executives can pursue and institutional factors that can be rearranged in order to overcome political obstacles. Lessons learned from these and other, less-successful, cases may provide insight into conditions under which countries can overcome the political impediments to quality reform.

Four Strategies for Overcoming Political Obstacles

Part 1 identified three broad political difficulties associated with education reform. Any political strategy or institutional setting that addresses these problems should, in principle, enhance the likelihood of reform adoption. This part suggests hypotheses about such strategies and institutional settings.

The hypotheses are grouped into four broad categories: 1) type and style of reform; 2) political strategies to bolster the supply of reform; 3) political strategies to bolster the demand for reform; and 4) institutional features that magnify or diminish the power of veto groups. The discussion of each hypothesis begins with a brief statement about why, at least in theory, the proposed hypothesis might have a causal impact on the chances of reform adoption. Then, examples from one or more cases are provided to illustrate the viability of the hypothesis. Finally, some caveats about the validity of the hypotheses are discussed. These caveats do not invalidate the hypotheses, but they raise issues that researchers and practitioners must consider. The discussion is not meant to establish conclusively the validity of the hypotheses, but to identify theoretically informed hypotheses that may or

may not be confirmed by further research. Due to time and resource constraints, the discussion of cases relies on secondary materials. Appendix 1 lists all cases discussed.

Reform Type

Hypothesis 1: Combining access elements into quality reform enhances reform adoption.

Argument: One way to diffuse the problems associated with quality reforms is to address the issue of concentrated costs/distributed benefit. Supplementing quality reform with access or expansion elements, which increase the resources available to key stakeholders and thus are politically much easier to adopt (Berryman 1997), might achieve this.

Examples: In Chile after 1990, the new democratic center-left administration of Patricio Aylwin increased school budgets and subsidies, and raised teachers' salaries (Espínola 1997:5-8). The government sought to gain support (and placate frustration) among key actors in the education sector who were dismayed over the government's intention to preserve many of the quality reforms initiated by the previous authoritarian regime.

In Mexico, after various failed attempts to decentralize the educational system in the 1980s, the administration of Carlos Salinas de Gortari (1988-1994) implemented a sweeping program for the modernization of education. By 1993 the government was able to transfer 513,974 teachers, 116,054 administrative employees, 1.8 million pre-primary students, 9.2 million elementary students and 2.4 million high school students from national to state-level jurisdiction (see Murillo 1999). An important component of the Salinas reform, absent in the reform efforts of the 1980s, was the use of access elements: teacher salary hikes were established above national wage ceilings; new pension benefits, and pay incentives were created (Murillo 1999). In addition, the government created a fund for social spending (PRONASOL), which included substantial spending on access education reforms.[9] Interestingly, this increased spending occurred at the same time that the government was carrying out market-oriented reforms and stabilization through fiscal and monetary austerity. These access elements served as compensatory mechanisms for reform opponents in SNTE, which had rejected every previous attempt to change Mexico's highly centralized system. Scholars have little doubt that the extra spending allocated for

[9] PRONASOL provided funding for building and refurbishing schools and student grants. Political scientists argue that PRONASOL played a larger role as a mechanism of political co-optation than economic compensation for economic losers (see Cornelius et al. 1994).

the education reform, at a time when other sectors were experiencing cutbacks, was a political strategy to win the support of unions.

Corollary: In addition to material compensation, governments can offer political privileges to reform adversaries.

Research on the politics of market-oriented reforms has found that governments that grant potential political challengers certain political privileges (e.g., centralized control over social spending, special treatment during election periods, access to policy-making, accommodation of some concerns of dissidents) stand a greater chance of obtaining the cooperation of those actors (Corrales 1997-98). In Mexico, the Salinas administration granted similar political privileges to the SNTE. The Mexican government allowed dissidents within the union to enter the national leadership by introducing proportional representation and abolishing the automatic affiliation of the union with the ruling party (Murillo 1999). In New Zealand, although the government imposed some reforms against the wishes of teachers (e.g., granting schools the right to hire non-unionized teachers), it also yielded on a significant political issue: jurisdiction over teachers' salaries was not granted to the newly created school boards, remaining instead under the control of the central government (Gordon 1992).

Caveat: It is a mistake to assume that access elements, especially when used for cooptation purposes, are unproblematic. Sometimes the increase in spending induced by access reforms creates opportunities for political patronage (see Gibson 1997; Weyland 1996), which can upset civic leaders and the public at large, and gives rise to accusations of governmental corruption. Pakistan provides a good illustration.[10] Two types of access reform were attempted in Pakistan in the 1980s. One flourished politically, while the other collapsed three years after its launch. The successful reform was an initiative to open schools in mosques located in villages where there were no primary schools (mostly poor areas). Funds were allocated to hire new teachers, provide a stipend to mosque leaders and acquire new school supplies and uniforms. The program became widely accepted. New users reached the hundreds of thousands.

The failed access reform was the Nai Roshni schools program, consisting of drop-in schools for children aged 10-14 who had left or never attended school. Like the mosque program, the Nai Roshni reform made use of existing facilities: schools were asked to offer

[10] The discussion of Pakistan draws from Warwick et al. (1990).

up to three hours of extra classes in the afternoon. Significant investments were made to hire teachers and provide school supplies. At some point, more than 390,000 students were enrolled. However, the Nai Roshni program failed politically because the public became convinced that the government was using the program for political patronage. The evidence was hard to challenge. Federal-level politicians, including those at the cabinet level, were given enormous prerogatives over hiring decisions.[11] Teachers desiring appointments needed recommendations from politicians. In addition, evaluation teams had very close ties to the agency in charge of the program, the Literacy and Mass Education Commission. Public outcry forced the government to terminate the program in three years.

Why did the mosque program become politically acceptable, while the Nai Roshni program became unpopular? Why did two similar access programs in the same country and in the same time period experience such politically dichotomous outcomes? The answer might have to do with the varying levels of decentralization that accompanied each reform. The mosque program was predicated on the direct involvement of parents and religious figures (the Imams).[12] Thus, the mosque program provided local stakeholders opportunities to develop a sense of ownership in the program. In contrast, the Nai Roshni program was set up with a maximum level of interference by central-level politicians. This made incumbents appear as the sole owners (and abusers) of the program, leaving no room for other actors. Finally, the mosque program converted a crucial actor—the clergy—into a stakeholder of the reforms (strategies for mobilizing potential supporters are discussed later). In short, access reforms that are not accompanied by reforms that enhance political accountability can be ineffective.

Hypothesis 2: An incremental rather than all-encompassing approach enhances the chance of reform acceptance.

Argument: Haddad (1994) argues that education reforms that follow a more gradual, step-by-step approach ("incremental") tend to encounter fewer political difficulties than

[11] For instance, a federal agency (the Literacy and Mass Education Commission) was authorized to make 30 percent of hiring decisions. Legislators at the national assembly were authorized to make an additional 30 percent of hiring decisions; and the Prime Minister was permitted to make 10 percent of hiring decisions.

[12] This involved a trade-off. The high-profile role granted to Imams undermined the accountability and effectiveness of the program. Imams were granted the final word on what is and is not done in the mosque. They were thus in charge of hiring and supervising teachers, tasks which many critics argue they did not perform professionally.

more comprehensive, sweeping reforms ("synoptic"). According to Haddad, a narrow scope allows officials to test the acceptance of the reforms and is less likely to provoke the mobilization of cost bearers. A piecemeal approach avoids the national spotlight and keeps to a minimum the number of cost-bearers.

Examples: Haddad illustrates his argument by comparing reforms in Jordan (1970s) and Thailand (1960s) with those in Peru (late 1960s-early 1970s). All three reforms were launched under non-democratic regimes. The Peruvian case even included far more consultation with citizens. Yet, the Peruvian case experienced the most serious implementation difficulties. He argues that a crucial explanation was that Jordan and Thailand adopted an incremental approach during the first stage of reforms, whereas Peru plunged directly into a synoptic approach (Haddad 1994:55-57).

Caveats: Two caveats can be raised. First, as Haddad acknowledges, incremental approaches also can generate political problems. In Jordan, for instance, the incremental approach gave no incentive for the government to invest much in terms of political capital or other resources. Government attention waned, leading to poor planning, which in turn led to implementation difficulties (Haddad 1994:102). A second caveat is that gradual approaches risk becoming less credible over time, leading many actors to doubt the commitment of the government which, in turn, hurts societal cooperation on reform (see Rodrik 1989). Incremental approaches also allow reform opponents more time and opportunities to organize and mobilize allies on their behalf. Finally, an all-out effort might be preferable because it allows the government to expand the number of actors involved beyond those who are merely affected by local reforms, thereby increasing the number of potential allies. Both Jordan and Thailand switched to a synoptic approach halfway into their reform processes and managed to follow through.

Hypothesis 3: Packaging education reforms with other types of reforms (of the state or the economy) enhances the chances of reform adoption.

Argument: Appending education reforms to a wider package of reforms might offer several advantages. It can generate greater credibility by signaling strong commitment to changing the status quo, which is crucial for societal endorsement of reforms. Commitment to other reforms might have spillover effects to education. And once the country has gained some reform momentum and seem positive results, the public is more likely to accept further reforms in other areas.

Examples: There are numerous examples of deep education reforms packaged with broader public sector reforms, including those in Australia, Argentina, Chile, New Zealand, Romania, Spain and, since the 1997 crisis, Thailand.

Caveat: Appending education reform to broader political and economic reforms also can give rise to new problems. Packaging education reforms with economic reform can sometimes tarnish the image of education reforms. In Peru in 1991, combining education reforms with a program of economic stabilization and adjustment allowed the opposition to mislabel all education reforms as "neo-liberal" and IMF-mandated. Given the negative connotations of these labels at the time, societal outcry against the reforms intensified (Graham 1999).

Or, governments might devote more attention to the other components of the reform package. Education reforms may fall through the cracks, or be sacrificed on behalf of other goals. In South Africa, the need to abide by democratic principles and to create a government of national unity has placed brakes on education reforms. On the one hand, the ruling African National Congress (ANC) party has agreed to slow spending and access reforms in response to reservations raised by the main opposition party, the National Party.[13] On the other hand, the ANC has had to resist some populist demands by various radical education groups, many of which have strong links to the ANC, leading to violent protests.[14] In response, the ANC slowed down some efficiency-oriented reforms. The result has been a reform impasse. The exigencies of consolidating a democracy respectful of minority parties and economic restraints created obstacles for access reforms, while radical pressure groups affiliated with the ruling party blocked quality reforms (see Pape 1998).

In Poland, education reforms were launched simultaneously with democratization and economic adjustment. The economic reforms produced a short-term rise in unemployment. Given the education sector's role as employer of last resort, government officials decided to slow down education reform.

[13] The National party (strong in Cape Town and representing white and upper-income colored constituents) opposed a new funding mechanism which mandated that only classes of 35 pupils in secondary schools and 40 in primary schools would be eligible to receive federal funding. Private white schools, many of which have smaller teacher-student ratios, felt that this reform left them out.

[14] ANC legislators have opposed a government proposal for the introduction of compulsory school fees on a sliding scale based on family income. The legislators demanded free education instead (see McGregor 1996; Vergnani 1993).

Bolstering the Supply Side

One way to overcome implementation difficulties is to counteract the shortcomings on the supply side of reform. The following are three possible ways to do so.

Hypothesis 1: Entrusting education reforms to ministries with low turnover rates enhances the chance of reform adoption.

Argument: Lowering turnover rates or transferring reform responsibility to ministries with low turnover rates resolves problems in the supply side such as lack of policy continuity, propensity toward quick fixes, little attention to long-term goals, preoccupation with alternative career plans, etc. Pension reforms have advanced more than education reform in Latin America in the 1990s partly because the former have been led by more stable and powerful ministries of finance (Nelson 1999).

Examples: In Australia after 1987 and Argentina after 1991, some responsibilities of education reform were transferred to ministries of finance. In El Salvador, the government kept reforms within the jurisdiction of the Ministry of Education, but assured the continuous tenure of a strong minister. A comparison with Colombia, where ministerial turnover rates remained high, illustrates the benefits of lowering turnover rates. Both countries launched major reforms in the 1990s, combining both quality and access elements, at a time of political polarization and widespread violence. However, reforms in El Salvador advanced farther. The government launched the EDUCO program, an effort to enhance school coverage in rural areas. Local councils, which include parents, received the authority to run public schools and make hiring, firing and budget decisions. Remarkably, the reformers elicited consensus among domestic actors, despite the prevailing political mistrust and despite the fact that EDUCO targeted rural areas, where conflict was greater (see Córdova Macías 1996; Reimers and McGinn 1997; Reimers 1997a; Meza 1997).

In Colombia, however, reforms ran into trouble (see Montenegro 1995). In 1989, Colombia's Congress approved legislation giving municipalities a greater role in basic services. This culminated in the 1991 Constitution, which established one of the most far-reaching decentralization mandates in Latin America, covering the education sector. Although some reforms were implemented from 1991 to 1994, the key components of the reforms—approval of school autonomy and the municipalization of basic education—could not be implemented. Part of the explanation for this was the inclusion of recalcitrant anti-reform groups, which compromised the reform process. There also may be a simpler and more fundamental explanation: lower ministerial tenure in office. Between 1989 and 1998,

El Salvador has had two ministers of education—an impressive degree of continuity. In fact, when the government changed in 1994, the minister of education and her staff were asked to remain in office. Colombia, on the other hand, had seven ministers between 1988 and 1997, almost one new minister per year.[15]

Caveat: First, ministerial turnover rates might be neither a necessary nor a sufficient condition for reform. Some cases of reform have occurred in contexts of high turnover (Australia, Jordan, Spain and South Korea). In other cases, low turnover rates have not produced major political breakthroughs (South Africa). Second, high ministerial turnover may actually be a symptom, rather than a cause, of difficulties. High turnover rates may reflect existing state-society tensions over the reform agenda; presidents may be changing ministers as a response to difficulties in containing conflict within the sector. A more refined hypothesis would be that low ministerial turnover might act as an independent variable—or at least as an inducement—of reform adoption, but its opposite—a high turnover rate—may be a reflection, rather than a cause, of such difficulties.

Hypothesis 2: Greater links with the outside world or the global economy enhance the chance of reform adoption.

Argument: Given that part of the new impetus for reform comes from external sources (see Part 1), it would follow that greater receptivity to the outside world results in greater incentives to pursue quality education reform. Openness to global forces exposes countries to the systemic imperative of developing a competitive economy, which encourages education improvements. External links also can provide governments with new political allies (international advisors) and sources of advice and funding that may stimulate reform initiatives.

Examples: Southeast Asian countries are classic examples of the presumed connection between openness to the global economy and adoption of quality reforms in education. In the 1960s, several Southeast Asian countries adopted an export-oriented model of development. Governments throughout the region reasoned that in order to gain an exporting edge in highly competitive world markets, they needed to raise the educational level of their workforce. Any table of countries with outstanding educational performance in the last 20 years typically includes Asian cases such as Hong Kong, Japan, Singapore, South

[15] Other possible examples of dichotomous outcomes correlated with different turnover rates include Romania-Poland and Argentina-Peru (see Appendix 1).

Korea and Taiwan (see World Bank 1993; International Labor Organization 1995). Singapore is a good example. To compete against counterparts in international markets, Singapore in the 1980s enacted reforms intended to produce the best-trained labor force in the region. The government stimulated competition among pupils by dividing them according to ability and selecting the most academically gifted students at the age of nine. It encouraged competition among schools by publishing academic results and permitting top schools to raise their fees and become semi-independent. The government even imposed a punitive tax on foreign firms with a high proportion of low-skilled workers, thereby boosting private sector demand for educated workers (Wooldridge 1993). Similarly, an explicit impetus for Thailand's newly enacted (1999) education reforms was adverse comparisons with the education systems in neighboring countries and the threat of falling competitiveness.

It also may not be coincidental that the rise of education reform on the political agendas of Latin America in the 1990s occurred simultaneously with the region's embrace of a more outward-oriented model of economic development, including deep trade liberalization (see Morrow 1998; Edwards 1995).

Caveats: External forces are important, but not decisive shapers of domestic reforms. They can help set the agenda, even stimulate reform. But outside of the realm of economic stabilization, external forces are insufficient to drive reform and cannot account for the variation in outcomes across cases, especially in administrative reforms of service-providing bureaucracies (Kaufman 1999:361). Furthermore, not all open-economy countries specialize in the export of goods and services that depend on high-skill workers. For example, many countries in Central America and the Caribbean have specialized in cheap-labor exports such as tourism, agricultural and primary commodities. For these countries, economic openness is not the primary incentive for quality education reform.

The pros and cons of involving international actors in education reform are similar to those in debates about the merits of globalization. For some, external ties are desirable to combat provincialism, improve standards, increase accountability of state officials, and imbue reforms with legitimacy, political power and resources, etc. For others, these ties undermine local initiatives, encourage politicians to pursue foreign agendas, create "races to the bottom" and generate nationalist backlashes.[16]

[16] For a glance at this ongoing debate, see Rodrik (1997) and Barber (1992).

Hypothesis 3: Independent pro-reform advisory councils bolster the supply of reform.

Argument: Perhaps one of the most promising ways to compensate for shortcomings in the supply of reforms is to establish independent advisory/monitoring councils to advise the ministry of education, debate and propose policy reforms, and monitor the implementation process. By establishing groups of reform advocates with longer terms of office than those of the education ministers, these councils may compensate for one of the main political obstacles to reform adoption—supply deficiency. Ideally, councils prevent inertia in the ministry and introduce continuity despite ministerial changes. Like independent central banks, independent councils can insulate difficult policies from political pressures and encourage governments to uphold discipline despite popular pressure. Unlike central banks, however, education advisory councils tend to include representatives from across society. As such, they can avoid the democratic deficit associated with independent central banks, which are always governed by a single non-elected/non-representative leader. In short, independent councils can help advance reforms because they can produce both policy impetus and ties between change teams and civil society.

Examples: Some of the most far-reaching reformers have established various forms of independent councils. In New Zealand, the Picot Commission, an independent task force composed of two educators, two business people and various politicians, was established in 1987 with a broad mandate to propose reforms (Gordon 1992:7). The Commission proposals included the creation of several independent institutions to sell the reforms and the government organized tours of pro-reform individuals from education groups including parent representatives, known as "cause champions," to speak at public fora on behalf of the reforms. In addition, a group of evaluators, composed of eminent educators, met regularly to scrutinize the activities of the working groups and serve as the liaison to non-cabinet parliamentary members with experience or interest in education (Perris 1997).

In Jordan in 1985, when King Hussein decided to switch from an incremental to a synoptic approach, he appointed the National Commission to Assess Educational Polices, a reform committee headed by the Crown Prince. The commission set up a central task force, comprising both private and public sector representatives, and appointed field committees to collect data. Overall, the committee monitored the reform process, evaluated policies, identified cost-effective innovations and advised the ministry (Berryman 1997; Haddad 1994:92-98). This advanced the reform process in a country notorious for a high turnover rate in the ministry of education. Another independent commission, the National Center

for Education Research and Development, which included representatives from high-level bureaucracies, vocational training corporations, universities and think tanks as well as economists and educators was established to monitor the implementation.

In El Salvador, an advisory council of 50 representatives from 30 different groups (including insurgents, clergy and technical experts) was created during the assessment stages. Stakeholders were required to submit position papers to the council, which proved so successful in maintaining the pace of reforms that the initially skeptical minister decided to extend its life throughout the implementation stages (Reimers 1997a).

In Mexico, quality control in higher education, an important feature of the 1990s reforms, has been delegated to bodies that are either independent of ministerial appointments or funding, such as CENEVAL,[17] or at least relatively autonomous (both from the ministry and unions), such as the peer review committees. These bodies have infused Mexico's reforms since 1988 with a significant degree of continuity, despite the increase in political turbulence on the national scene and high ministerial turnover in the 1990s (Kent 1997).

In Thailand in 1974, the Council of Ministers established a special committee of prominent and highly respected Thai intellectuals, high-level bureaucrats, education experts and representatives from civic organizations and teachers unions (Haddad 1994:140). This commission succeeded in gaining societal acceptance for potentially polemical reforms, such as the diversification of secondary school education. More recently, independent commissions chaired by respected business leaders played a key role in the design of Thailand's 1999 reforms.

Comparable independent bodies have been created in Chile (the Brunner Commission), South Korea (the Committee on Education Reform Implementation), Romania (the National Council for Reform of Education) and Uruguay (the National Administration of Public Education, in charge of primary and secondary education).

Certain commonalities emerge from these cases. To be effective, independent advisory/evaluative bodies should include not just politicians, but also representatives from civil society, respected intellectual leaders, opinion-makers such as journalists and think-tank

[17] CENEVAL (Centro Nacional de Evaluación) is a non-governmental institution charged with entrance examinations for upper secondary schools and higher education. CENEVAL is allowed to generate income through the sale of assessment services to educational institutions, both at home and abroad.

experts. In some cases (e.g., Uruguay), involving technocrats from international organizations such as ECLAC helped politically to signal impartiality and competence. In the 1970s in Thailand, community leaders disseminated information concerning schools and made suggestions regarding how schools might contribute to the community.

Independent advisory councils are not panaceas, but they can perform crucial political tasks. First, the respectability of council members infuses the reform effort with credibility, thus contributing to societal acceptance. Second, council members who are journalists and intellectuals establish links between reformers and the opinion-making sector, thus increasing the chance that local commentators become both stakeholders and frequent writers on the topic. Third, and most important, councils counteract expected shortcomings in the supply of reform initiatives. In some cases, for instance, heads of state instruct their ministers of education to follow the directives of these independent councils. Setting up a formally constituted group with longer terms of office, nonevident alternative career plans and interest in the reform can act as an effective counterbalance to the negative side-effect of high ministerial turnover.

Caveat: The effectiveness of independent advisory/evaluative councils may depend on the initial degree of commitment at the executive level. Initially, the chief executive must be committed enough to appoint the independent body, and second, to instruct the minister to follow its advice. Councils cannot easily create government commitment to reform where it does not already exist. What the councils can do is to galvanize existing commitment, give it direction, prevent it from waning during the implementation period, and establish stronger links between the state and society. Another problem is that, over time, councils can become yet another vested interest group, more concerned with defending the status quo than promoting accountability. Finally, advisory councils do not easily address one of the most serious problems of education reform: opposition from cost-bearers. Mechanisms for engaging societal allies and neutralizing reform opponents are still necessary.

Bolstering the Demand for Reform

The recent swelling of societal demand for quality education reform might still be insufficient. Left to themselves, quality reform beneficiaries (e.g., parents, employers and citizens in general) are unlikely to coalesce into strong pressure groups advocating reforms. A successful reform strategy requires mechanisms for counteracting weaknesses on the demand side.

Hypothesis 1: Information dissemination strategies bolster the demand for reform.

Argument: Citizens tend to minimize the time and energy they spend informing themselves about public affairs. In a world of limited time and resources, they may see little reward in investing energy to understand increasingly complex issues over which they have little influence ("rational ignorance"). Consequently, citizens resort to information shortcuts to form their opinions. They follow cues from technical experts, favorite politicians, peers, or good marketing campaigns, rather than actively research all existing information. This can be either a liability or an asset for change teams. On the one hand, rational ignorance and information shortcuts make citizens susceptible to veto groups, which mount effective and emotional public relation campaigns that serve as information shortcuts. On the other hand, if change teams mount their own pre-emptive information campaigns, they stand a chance of gaining citizens' support. Information dissemination is more likely to be effective if it is backed by professional, scientific research (see Reimers and McGinn 1997).

Examples: In New Zealand, the government established working parties (composed of leaders from all interest groups) which met regularly at the local level to seek consensus on reform implementation. In El Salvador in the 1990s reformers used both information dissemination and inclusion strategies. At a time when societal enthusiasm for the reforms was waning, local reformers, together with a team from the Harvard Institute for International Development (HIID), held a series of meetings and workshops with local actors, civic leaders, business leaders, journalists, ministerial staff, etc. (One of these meetings involved the presidential candidates.) As a result, the opposition parties endorsed the reform. In Uruguay the reformers also conducted a massive information campaign once the reform program was designed. These efforts succeeded in convincing citizens about the need for extensive reforms, not a trivial accomplishment considering that in the late 1980s few citizens treated education reform as an urgent matter.

Caveats: First, a high-profile approach is not always appropriate. During the gestation period (e.g., when studies about the country's educational deficits are being conducted), a low-profile approach might be wiser. At this stage, the government is ill equipped to win a public relations war, if one develops, particularly since its findings and recommendations may be incomplete or not agreed or both. Engaging the entire public in a policy debate at a time when the reformers themselves are unsure about their positions can backfire.

Some authors even suggest shielding the reform team from outside interference during this stage (e.g., see Thomas 1994). In Uruguay, El Salvador and Nicaragua, officials launched massive information-consultation campaigns only after the diagnostic tests in public schools were completed and proposals for reform were drafted.

Second, information dissemination may bolster demand, but it may be ineffective in neutralizing opposition from cost-bearing groups. Adversely affected parties in the reform process do not always accept as valid even the most transparent information provided to them (Reimers and McGinn 1997; see also Husén 1994:18). For instance, in a referendum among teachers on the need for reform, 78 percent of teachers in Poland voted in favor of no reform, despite the government's all-out information campaign (Sabbat-Swidlicka 1994). In Pakistan, a team from the HIID conducted extensive research on the education needs of the country, only to discover that education officials were completely unmoved by the findings (Reimers and McGinn 1997:xiv). Most likely, the officials understood the issues at stake, but nonetheless rejected the information because they had concrete reasons to fear their implications—the reforms would curtail the power of central bureaucrats.

In short, in some cases, a more successful strategy may be to keep a low-profile information strategy during the reform gestation period, then switch to a high-profile strategy of dissemination when advocates have a better idea of needs and goals, supplemented by strategies to deal with reform opponents.

Hypothesis 2: Involving potential beneficiaries in reform design and evaluation enhances the chance of reform acceptance.

Argument: Because beneficiaries face distributed benefits as well as various exit options, they do not often coalesce into effective pressure groups. Incorporating potential beneficiaries in the reform process might counteract this. The notion that the inclusion of actors enhances reform acceptance is paramount in theories of democratization and corporatism. Inclusion gives change teams the opportunity to address reservations and, more important, to convert opponents (see Reimers 1997b). Inclusion can turn passive beneficiaries into active stakeholders. Inclusion also allows reformers to uncover and respond to opponents' objections. Thus, "an expanding body of evidence supports the conviction that including local personnel, such as teachers, in decisions about improving schools fosters more effective implementation of reforms" (Thomas 1994:1855; see also Navarro et al. 1998; Reimers and McGinn 1997; Crouch and Healey 1997:I-15 and I-17; Fiske 1996; World Bank 1995:138-142; Husén 1994:8-9).

Examples: In Pakistan, one reason for the success of the mosque program was the incorporation of the religious sector, the Imams, who were given a direct role in the schools. In Thailand in the 1970s, the government included local providers and consumers of education in the implementation process (Haddad 1994:157). Teachers and school administrators were brought in to help design a diversified curriculum; administrators, parents and students were called on to assess its success. Schools offered training and awareness programs, providing town and village dwellers opportunities to observe the new schools in action. In El Salvador, New Zealand and Nicaragua, parents were given a role as voting members in newly created school-level councils or boards of trustees, charged with school management. In New Zealand, student representatives were also given seats, and a 1991 revision of the by-laws allowed anyone, not just parents, to be elected to boards of trustees in order to encourage involvement of other potential beneficiaries, e.g., business leaders.

Caveats: As with information dissemination strategies, inclusion might be ineffectual—maybe even counterproductive—in dealing with reform opponents. Reform opponents may take advantage of their inclusion in policy deliberations to derail the reform process. Opponents do not give up their opposition simply because the government listens to them. In Argentina in the 1980s, reform opponents included in public debates blocked meaningful reform. The new administration of Raúl Alfonsín (1983-1989), elected after seven years of authoritarian government, attempted to improve relations with actors in the education sector and pave the way for quality education reforms by adopting a policy of change through citizen participation. The government convened a Pedagogical Congress, made up of local provincial and national assemblies to meet over the course of several years to reach a consensus on a new education law. "[E]veryone was to have the right to participate," including actors with a vested interest in the status quo (Hanson 1996:309). After four years of constant debate, no meaningful consensus emerged. Cost-bearing groups, including teacher unions and clerical interests, took advantage of their inclusion in policy deliberations to water down the reformist impetus.

Colombia's reforms in the early 1990s, which called for one of the most far-reaching decentralizations in Latin America, were blocked in part by the leading teachers' union (FECODE), a highly organized and centralized union with more than 200,000 members. Government officials never managed to persuade FECODE. Inclusion of FECODE in policy deliberations ended up impeding the deepening of reforms. Moreover, it sent the wrong signals to congressional leaders. It led them to overestimate the degree of societal

opposition to reform. As a result, both Congress and the minister of education began to question the desirability of some reforms (Fiske 1996; Montenegro 1995). New legislation adopted in 1993 and 1994 did not provide schools the autonomy to select, hire or sanction personnel.

In Poland in 1993, the 300,000-strong Polish teachers' union (ZNP) resisted the government's attempt to decentralize secondary education and introduce a performance-based promotion system for teachers. To placate this opposition, the government appointed a ZNP leader as deputy prime minister of education in 1994 and promised to raise teacher salaries. ZNP opposition remained as unyielding as ever, eventually forcing the minister of education (Kazimierz Marcinkiewicz) to resign (see Sabbat-Swidlicka 1994).

In short, inclusion may be an insufficient step. It does not address the main reason that veto groups oppose reforms. It also fails to protect change teams from the actions of veto groups.

Hypothesis 3: In cases of decentralization, granting greater financial autonomy to local entities enhances local-level demand for reform.

Argument: To bolster local-level demand for decentralization, it is necessary to generate "local empowerment," i.e., grant local organs the appropriate authority and means to manage resources (Kemmerer 1994:1415; see also Rondinelli et al. 1989). Without autonomy over budget, tax collection, and personnel matters, local entities will see decentralization more as a burden than an opportunity, possibly turning against the reforms.[18] Conversely, accompanying decentralization with increased financial transfers or revenue powers can increase the chance of local support for education reform.

Examples: In Spain in the 1980s, a social democratic government carried out a quasi-devolution of decision-making authority in education to 17 newly created quasi-federal regions, called autonomous communities, some of which harbored strong pro-independence movements (Hanson 1990; Hanson 1989). The central government granted local councils authority over school staffing and budget issues. The six communities that were granted *competencias*, i.e., decision-making authority plus financial transfers, willingly accepted the new decentralized reforms. In Papua New Guinea, provinces received both the authority to run schools and considerable control over expenditures. Local entities thus

[18] For efficiency gains associated with local budget autonomy, see Savedoff (1998).

became strong allies of reform-minded officials because they received both rights and new responsibilities. In Argentina in 1991, at the time of the decentralization decision, provinces received a significant increase in funding to manage education, facilitating the approval of the 1992 Federal Education Law. Predictably, when these revenues began to decline in 1995, tensions between the central government and the provinces resurfaced (García de Fanelli 1997:99-102).

Caveats: The literature on the benefits and shortcomings of decentralization is vast, suggesting that decentralization is not a panacea. Leaving aside the controversial question over whether decentralization produces better learning, there are political risks associated with decentralization. Decentralization might reduce, rather than increase, the accountability of the local elite. Decentralized institutions might reflect, rather than resolve, regressive social practices. In Bijnor, India decentralized local schools incorporate provincial discriminatory practices, discouraging access to schools by Hindu girls and Muslim minorities (Jeffery and Jeffery 1998). Moreover, granting fiscal autonomy to local entities may be insufficient to address a larger political problem with decentralization—equivocal, insincere, or mixed commitment on the part of central authorities, as discussed in Part 1. These problems will persist even after local entities become strong reform advocates. Once the original factors that motivated the state to decentraiize subside (information and fiscal deficits, legitimacy needs, inter-tier or inter-bureaucratic political conflicts), central authorities may be tempted to reverse decentralization.

Neutralizing Reform Opponents by Overcoming Institutional Obstacles

Often, veto groups will be unswayed by strategies of inclusion, information, or compensation. It may then become necessary to think of strategies to reduce the political leverage of these veto groups. Teachers' unions can be one such group. Teachers' unions often perceive quality reforms as extracting serious material and political sacrifices on their part. Compared to other cost-bearers, teachers' unions enjoy comparative political advantages as pressure groups (see Part 1). Their opposition can seriously undermine reform processes. For these reasons, reform approval and implementation is contingent on the cooperation of teachers' unions, or at least, preventing them from derailing the reform process.

Under certain conditions, governments may be powerless to do this. Union cooperation may depend on institutional factors beyond the control of reformers. Under other conditions, however, governments can significantly affect the propensity of unions to cooperate. This section examines some of these conditions.

Hypothesis 1: The affiliation of teachers' unions (or any cost-bearing group) with opposition political parties hinder government-union cooperation.

Argument: Many political scientists stress that public policy is greatly shaped by the characteristics of domestic political institutions (see Kaufman 1999; Crowson et al. 1996). The features of the party are critical. In fragmented and polarized political party systems, governments face greater governing problems (Haggard and Kaufman 1995; Mainwaring and Scully 1995). It follows that unions with strong institutional links to opposition parties in polarized or fragmented party systems are likely to turn uncooperative. If opposition parties have a strong presence in the legislature, union resistance is likely to be even stronger. A symbiotic relationship between the two actors emerges. Parties in the legislature with links to unions deem them to be worth defending in fear that loss of union support will damage re-election prospects. Simultaneously, unions that expect the support of the legislature are more likely to adopt a rečalcitrant stand; they shout because they expect to be heard. This pressures legislators to be even more attentive to union demands.

Examples: In Poland in 1994, once the leading teachers' union developed closed links with the main opposition party, the Democratic Left Alliance, the reform process slowed down. Similarly, in Argentina between 1983 and 1989, the government's attempt to reform the state and stabilize the economy generated enormous tension between the ruling party (the UCR) and the main opposition party (the Peronists). When, in 1986, the Peronist Party took leadership of a teachers' union (CTERA) away from the ruling party, government-teachers' unions relations turned increasingly hostile. In the 1990s, the government has had trouble introducing university reforms in part because of the strong links between university student associations and the opposition parties (García de Fanelli 1997).

Caveats: While union affiliation with opposition parties might hinder government-union cooperation, union affiliation with the ruling party is no guarantee of union cooperation. Unions can use their ties to ruling party leaders, many of whom occupy influential positions in government, to advance their political preferences. This is one reason that efforts to decentralize education in Mexico in the 1980s failed. The SNTE opposed negotiating working conditions and other matters with 31 separate governmental entities (Fiske 1996:18). A series of union strikes followed. Checkmate occurred when unions began to use their links with other anti-reform ruling party members to block the reforms jointly. Ruling party affiliation thus facilitated the rise of a formidable union-bureaucrat coalition that forced the Mexican executive to retreat (McGinn and Street 1986:486-488; Lorey 1995; Perissinotto 1983).

Corollary: Improving executive-legislative relations on the issue of education reform can moderate union opposition.

Political parties with links to veto groups are not always beholden to these groups. Sometimes influence runs the other way. Parties can discipline and gain the cooperation of affiliated interest groups. Presidents who manage to negotiate directly with—and win over—political parties may succeed in getting these parties to obtain the cooperation of their ancillary groups. Reform-minded executives who take congressional relations seriously (e.g., consult with opposition parties, encourage ministers and technical advisers to attend congressional hearings, respond to legislators' concerns, accept some of the opposition's demands, etc.) stand a fair chance of obtaining this type of endorsement (see Corrales 1997). Given the widespread popularity and prestige of many education reforms, even legislators from the opposition may be persuaded to support education reforms, reserving disagreements with the executive for other, more contentious public policies, provided, of course, that the executive takes their concerns into account. This may neutralize union opposition. Once unions realize that their allies in congress will not act on their behalf, their propensity to act uncooperatively may subside.

Hypothesis 2: Internal union fragmentation hinders union-government cooperation; external union fragmentation diminishes the power of unions.

Argument: Murillo (1999) argues that even more important than union political affiliation are levels of union fragmentation, both internal and external. Internally fragmented unions, i.e., unions whose leadership faces serious internal upheaval, including challenges to the leadership, are likely to contest reforms. When union leaders feel threatened from below, they are more likely to act as "agents of workers." They will feel a greater need to compete for members' votes by challenging state efforts to impose constraints. Union leaders who do not face internal challenges, on the other hand, will feel more comfortable cooperating with the state and even accepting certain sacrifices, as long as there is some compensation.

On the other hand, externally fragmented unions, i.e., those in which multiple unions compete with one another for teacher membership, will be less effective in disrupting reform. In this institutional setting, "each union is weaker; and all of them can only bargain after coordinating their actions." (Murillo 1999:48). The collective action problems associated with fragmentation reduce the capacity of unions to block the reforms.

Examples: Murillo illustrates her argument by comparing Mexico and Argentina in the 1990s. Both are cases of reform implementation but involve different degrees of government concession. In Mexico during the early 1980s, the SNTE faced internal fragmentation, which prompted union leaders to adopt a more adamant anti-reform posture. When President Salinas took office in 1988, he addressed this by settling internal fragmentation and offering political and material concessions. Union cooperation followed. In Argentina, teachers' unions faced external fragmentation. In addition to three major unions at the national level (CTERA, UDA and AMET), there were many smaller independent unions at the provincial level. Unions thus had all the right motivations to challenge the government (their position as cost-bearers, their links with opposition parties) but none of the bargaining power to extract concessions (external fragmentation). Thus, the government yielded less.

Caveats: The institutional factors that fuel union propensity to challenge reforms—links with opposition parties in a polarized party system and levels of internal and external fragmentation—are not insurmountable. Governments can still counteract these institutional obstacles, either by isolating reform opponents or creating counterbalancing coalitions with other pressure groups.

Hypothesis 3: Strategic coalitions between cost-bearing groups and other societal actors hinder reform adoption.

Argument: When veto groups form strategic coalitions with other societal groups, reform adoption suffers. Change teams must therefore anticipate and counteract these coalitions. It is important to understand which actors may serve as potential coalition partners of cost-bearers.

Actors in processes of education reform can be classified into two groups (Cerych and Sabatier 1994). One group consists of affected players, or cost-bearers: those who directly bear the consequences of reforms and play important roles in the implementation process (e.g., teachers' unions, bureaucrats, school principals, politicians in parliament and university student groups). The second group consists of outsider players: those who do not bear the impact of the reforms directly, beneficial or otherwise (e.g., citizens-at-large, employers, intellectual leaders, the media, the clergy, some students, some parent groups and non-governmental organizations). Although not direct stakeholders, outsider players are crucial in the politics of education reform because they can be decisive allies of either pro-reform or anti-reform players.

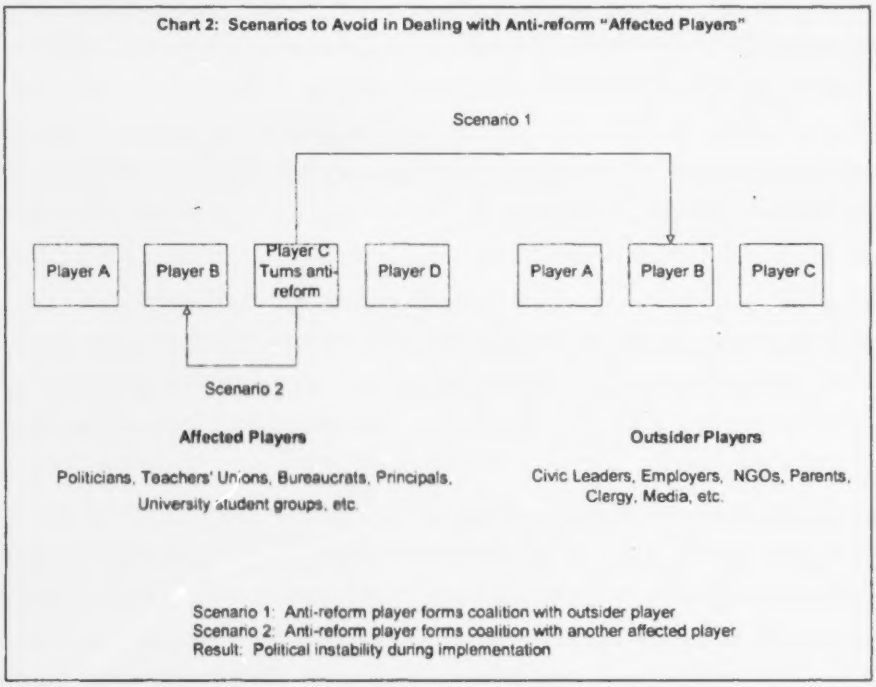
Chart 2: Scenarios to Avoid in Dealing with Anti-reform "Affected Players"
Scenario 1
Player A
Player B
Player C Turns anti-reform
Player D
Player A
Player B
Player C
Scenario 2
Affected Players
Politicians, Teachers' Unions, Bureaucrats, Principals, University student groups, etc.
Outsider Players
Civic Leaders, Employers, NGOs, Parents, Clergy, Media, etc.
Scenario 1: Anti-reform player forms coalition with outsider player
Scenario 2: Anti-reform player forms coalition with another affected player
Result: Political instability during implementation

If unions build coalitions with either outsider players (Scenario 1 in Chart 2) or with cost-bearing groups (Scenario 2 in Chart 2), the reforms are in jeopardy. If change teams pre-empt these coalitions, perhaps even counterbalancing them by building coalitions of their own, they may reduce the power of veto groups.

Examples: In Australia between 1987 and 1992, the national government launched a far-reaching systemic reform, including site-based management of schools and the establishment of a national curriculum at the primary and secondary levels. The reforms were informed by the principles of economic rationality: greater school efficiency, higher output targets, effectiveness and accountability without generating higher levels of state expenditures (Robertson and Woock 1991). The unions proceeded to build an anti-reform alliance with another affected player—politicians in parliament (Scenario 2). The government responded, not by counterbalancing these alliances but rather by deploying a corporatist strategy: incorporating into policy-making officially recognized interest groups affected by the reforms (Robertson 1994; Robertson and Woock 1991). The result was that the leverage of unions actually increased. They had not only societal allies, but also access to policy-making, which they used to block the project. By the late 1980s, despite the issuance of more than 20 major reports calling for reform, very little was accomplished (Robertson and Woock 1991).

Caveat: Unlike the other two conditions (union-opposition links and levels of fragmentation), coalitions with other societal actors can be shaped by government actions. Specifically, governments can succeed in working around recalcitrant opposition groups. As a general rule, governments should not be in the business of excluding political opponents, or of surrendering its attempts to make new converts. Seeking to isolate a societal player is always politically risky because it fuels the ire of anti-reform players and signals a lack of commitment to participation, which can tarnish the credibility of the reform process. However, when recalcitrant opponents are involved and show no signs of yielding despite the best efforts by change teams to persuade them, working around them might be the only choice. It is crucial at this point to mobilize new coalition partners.

This is precisely what the state government of Victoria, Australia did after 1992. A new reform-minded minister advanced education reforms by avoiding corporatism and deploying instead strategies to counterbalance the coalitional possibilities of unions. The minister avoided confrontations with the unions and instructed bureaucrats to do the same. He even ceased mentioning the unions in public (Pascoe and Pascoe 1997; Robertson 1994:103). The government also foreclosed scenario 1 by forming its own alliances with other actors. The government deployed an intensive communication and inclusionary campaign targeted at outside players. For instance, it organized a series of meetings with journalists, civic groups, NGOs, parental associations and numerous other civic leaders. It made heavy use of newspaper advertisement and information dissemination campaigns. The government also foreclosed the possibility of scenario 2. It deployed a strategy of co-opting school principals, one of the affected players in the reform process. School principals were granted a handsome package of inducements for involvement, including the ability to hire their own staff and manage their budgets, freedom from many bureaucratic regulations, attractive remuneration packages and professional development programs. In short, the government built a strategic alliance with outsider actors as well as one crucial potential cost-bearer (principals), which effectively preempted the coalition possibilities of veto groups.

Mexico in the 1990s followed a similar approach. By channeling funding into previously under-funded education sectors and actors, the government gained new political allies and, in the process, diminished the alliance possibilities of unions. For instance, the government funded the creation of 18 new technological institutes with close links to private sector employers. Public institutions were urged to augment their income using nongovernmental sources, including raising student fees, selling services and establishing contracts with the private sector. As a result, new actors—businessmen, rectors, department

heads, policy consultants and researchers—were included and, consequently, the potential cost-bearers—union leaders, student activists and sectors of academia—were "pushed off to the sidelines" (Kent 1993).

Coalitions thus maximize the power of veto groups, but also of change teams. If change teams succeed in forming their own coalitions with outsider and affected players, they can overcome some of the institutional factors that bolster the power of veto groups.

Conclusion

The political impediments to education reform are not trivial, but they are not insurmountable either. Since the 1980s, numerous countries from various regions with different levels of development have managed to approve and implement impressive quality-oriented education reforms. The lesson from these cases is that reform implementation is more feasible politically when the following conditions are met:

1) Addressing the cost-impact of reforms

There are three ways to address the cost-impact of reforms. These strategies, however, involve trade-offs. The first is to compensate for the costs of reform with concentrated benefits. These benefits can be material (higher wages) or political (reorganization of union politics). One potential pitfall of this is the possibility of using these benefits for corruption and political patronage. A second strategy is to "lower" implementation costs by moving incrementally. This can reduce the intensity of opposition, but runs the risk of reform processes losing momentum. A third strategy is packaging education reforms in tandem with broader public sector reforms. This can make cost-bearers feel less singled out, but also can lead to education reforms being marginalized or compromised.

2) Bolstering the supply of and demand for reform

Both the supply (government initiative) and demand (organized citizen acclaim) for quality reforms in education are likely to be weak or unreliable. Successful reform adoption requires addressing this. Weaknesses in the supply of reforms can be addressed by ensuring longer terms of office for reformers (i.e., lower ministerial turnover), maintaining links with the global economy and international advisors and, importantly, setting up independent/advisory councils. The latter option emerges as a promising institutional channel available to almost any government. Independent councils have the potential to galvanize and sustain ministerial commitment while simultaneously forging ties between reformers and societal groups.

Weakness in the demand for reform may be enhanced through: a) inclusionary strategies that assign concrete roles to passive stakeholders (e.g., incorporate parents in new school-level boards), b) information campaigns that counteract the propensity of the general public to remain rationally ignorant; and c) granting financial autonomy (not just new duties) to local entities in cases of decentralization. One should bear in mind that these

steps are effective mostly as mechanisms for mobilizing potential beneficiaries who might be initially apathetic about reforms. They are less effective and may even be counterproductive as strategies to deal with recalcitrant cost-bearing groups. These groups will not become supporters of reform simply because they are listened to or targeted by information campaigns.

3) Addressing the institutional factors that magnify the bargaining power of veto groups

Serious education reforms inevitably produce losers. Whether or not these losers take active stands against the reforms may depend on certain institutional variables: a) strong links between veto groups and opposition parties in polarized political party systems, b) the status of executive-legislative relations; c) leadership challenges inside and outside the unions; and d) strategic coalitions between veto groups and other societal groups. Of these, (b) and (d) seem to be the most malleable by government policies. These are areas in which governmental policies can overcome institutional blocks.

It is clear that for quality education reforms to proceed politically, these three political hurdles must be overcome. It is less clear, however, which variables or approaches are most effective in addressing each of these hurdles. Because of limitations in the selection process of the cases used, this paper can not provide definitive assessments about the general validity of hypothesized factors. However, the factors identified are theoretically informed and, most important, grounded on empirical examples, and thus deserve attention by future researchers.

Appendix

1

Changes in Ministers of Education and Ministers of Finance in Selected Cases of Education Reform

	Argentina		Australia		Chile		Colombia		El Salvador		Indonesia		Jordan	
Year	**Education**	**Finance**	**Education**	**Finance**	**Education**	**Finance**	**Education**	**Finance**	**Education**	**Finance**	**Education**	**Finance**	**Education**	**Finance**
78	Catalan	Martinez	Carrick	Robinson	Niemann	de Castro	Rivas	Palacio	Herrera	Lopez	Thayeb	Wardhana	Majali	Ad-Dabbas
79	Llenera				Vial		Lloreda	Garcia			Joesoef			
80			Fife		Prieto				Colindres	Riqueza			Shafiq	Musadeh
81				Guilfoyle			Angulo		Aquilino	Tenorio	Jusuf		Al-Tal	
82	Burundarena	Aleman					Alban	Wiesner						
83	Licciardo	Wehbe	Baume		Arriagada	Lüders	Arias	Gutierrez						
84	Alconada	Grinspun	Ryan	Dawkins	Aranguloz	Cáceres	Escobar			Rigoberto	Notosusanto	Prawiro	Al-Saket	Odeh
85				Walsh		Escobar	Eder	Junguito	Buendia	Lopez				
86		Vital			Gaete	Büchi	Suarez	Palacios			Hassan		Al-Majali	Awdah
87	Rajneri						Uribe	Gaviria					Al-Hindawi	
88	Sabato		Dawkins		Guzmán		Yepes	Alarcon	Cruz					
89	Salonia						Becerra					Sumarlin	Al-Asad	
90		Rapanelli			Salamé	Costaval			Hernandez	Alvarado			Hamdan	Jardaneh
91		Erman		Willis	Lagos	Foxley	Valdivieso	Hommes					Akaileh	
92		Cavallo	Beazley				Holmes		Gallardo	Sagrera			Hindawi	
93	Rodriguez				Arrate									
94			Crean	Beazley			Pachon				Dojojcnegro	Muhammed	Al-Ommar	Gammo
95					Molina	Aninat	Saravia	Perry		Cordova			Al-Rawabidah	Jardaneh
96							Mejia						Al-Masri	Awad
97	Decibe	Fernandez	Vanstone	Fahey	Arellano		Nino	Ocampo		Zablah				Hafiz
98			Kemp					Urindula					Hamdan	
Average Tenure (years)	2.1	2.33	2.33	3	1.75	2.63	1.24	1.75	3	2.33	3.5	5.25	1.5	2.33

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Appendix 1 (continued)

	Liberia		Mexico		New Zealand		Pakistan		Papua New Guinea		Peru		Poland		Romania	
Year	Education	Finance	Education	Finance	Education	Finance	Education	Finance	Education	Finance	Education	Finance	Education	Finance	Education	Finance
78	Hoff	Phillips	Solana	Ibarra	Gandar	Muldoon	Khan Hoti	Kazi	Tammur	Holloway	Elésperu	Saenz	Kuberski	Kisiel	Gadea	Dumitrescu
79	Blamo				Wellington			Ishaq Khan			Guabloche	Silva				
80	Fahnbulleh	Zulu							Tulo	Kaputin			Tejchma		Spomic	Niculescu
81											Alarco	Ulloa	Kruszewski	Krzak		
82	Boley	Jones									Benavides		Faron			Gigea
83			Reyes	Silva					Holloway	Bouraga		Rodríguez		Nieckarz	Teoreanu	
84							Afzal				Paniagua	Benavides				
85					Marshall	Douglas		Vacant	Wingti		Cardo	Garrido-Lecca				
86	Gonga		Gonzalez				Aheer	Khan Wattoo	Matiabe	Chan	Pango	Alva	Michalowska			
87		Bestman		Petricioli		Davis				Kwarara				Samojlik		Babe
88		Farhat			Lange		Haider		Aoae		Cabanillas	Saberbein	Bednarski			Paraschiv
89			Bartlett	Aspe		Caygill	Shah	Bhutto	Genia	Pora		Rivas	Fisiak	Wroblewski		Patan
90		Shaw			Goff							Vásquez	Samsonowicz	Balcerowicz	Sora	
91	Vacant	Tarr			Smith	Richardson	Imam	Aziz	Samana		de la Puente	Boloña	Glebocki		Gheorghe	Dijmarescu
92	Vacant		Zedillo								Barillas		Stelmachowski	Vacant	Golu	Danielescu
93	Vacant								Baing	Chan		Camet	Flisowski	Osiatynski	Maior	Georgescu
94	Zangai	Tarpeh	Solana			Birch	Shah	Bhutto		Iangalio	Trefles		Luczak	Kolodko		
95			Limon	Ortiz					Onguglo	Haiveta	Córdova		Czamy			
96	Bah	Kromah			Creech						Palermo		Wiatr			
97							Ali Shah	Aziz	Vacant					Belka	Petrescu	Ciumara
98	Kandakai	Saleeby		Gurria			Ghous Ali Shah		Taranupi	Yagabo		Baca	Handke	Balcerowicz	Marga	Daianu
Average Tenure (years)	1.91	2.1	3	3.5	3	3	2.33	2.63	1.75	2.1	1.62	1.62	1.4	1.91	2.33	1.91

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Appendix-1 (continued)

	South Africa		South Korea		Spain		Thailand		Uruguay		Venezuela	
Year	Education	Finance	Education	Finance	Education	Finance	Education	Finance	Education	Finance	Education	Finance
78	Cruywagen	Horwood	Chan-Hyun	Yong-Whan	Cavero	Fernandez	Martin	Suthatham	Darracq	Arismende	Rafael	Silva
79				Won-Ki				Pungtrakul			Hernandez	Ugueto
80	Janson		Ok-Gil	Woun-Gie	Otero	Garcia	Ketudat	Viravarn				
81	Viljoen		Kyu-Ho	Sung-Yun	Ortega							
82				Bae-Rha	Mayor		Sirisumpundh	Hoontrakool	Lombardo			
83				Kyung-Shik	Maravall	Boyer				Aznarez		Sosa
84			E-Hyok	Mahn-Je			Leekpai		Schoeder	Villegas	Lerner	Azpurua
85	de Klerk	Du Plessis	Jae-Suk						Reta	Zerbino	Carbonell	
86				In-Yong		Solchaga						
87							Bunnag	Singhasaneh				
88			Young-Shik	Kong-Il			Ratankoses				Cabello	Hurtado
89			Won-Shik	Kyu-Sung	Solana			Sabhavasu			Roosen	Hurbe
90	Merwe			Yung-Euy					Garcia	Braga		Pocaterra
91			Hyong-Sup				Sawasdipanicha	Singhasaneh				
92	Marais	Keys	Wan-Kyu	Yong-Nam				Simasathien		Posadas	Augusto	Rosas
93			Byung-Moon	Jae-Hyung	Perez		Thongsamak	Nimmanahaeminda	Mercader		de Calderas	Rafael
94	Bengu		Sook-He		Suarez	Solbes					Cardenas	Sosa
95		Liebenberg			Saavedra		Randsitpol	Sathianthai	Lichtensztejn	Mosca		Matos
96		Manuel	Byung-Young	Woong-Bae	Aguirre	Rato		Chunnanand a				
97				Kyong-Sik		De Ratoy		Vacant				
98			Hae-Chan	Kyu-Song			Silpa-Archa	Nimmanahaeminda				Izaguierre
Average Tenure (years)	3	4.20	1.62	1.31	2.1	3	2.1	1.62	3	3	2.33	1.75

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Appendix 1 (continued)

	Zimbabwe		
	Education	High. Educ. (created 1988)	Finance
78	Walker		Colville
79	Conjé/Gibson		Bullé
80	Muturnbuka		Nkala
81			
82			Chidzero
83			
84			
85			
86			
87			
88	Chung	Muturnbuka	
89		Vacant	
90		Ishemunyoro	
91			
92			
93	Mangwende	Mudenge	
94			
95	Lesabe	Chombo	Chambati
96	Garwe		Murerwa
97	Machinga		
98			
Average Tenure (years)	2.63	2.2	3.5

Source: *Europa World Yearbook*, various years.

Notes: The *Yearbook* does not publish exact tenures of a country's ministers. Instead, it provides the name of the minister available to the editors at the time of publishing, usually between January and March. The *Yearbook* would not reflect two or more changes of ministers in one year. Thus, this list may under-represent the exact number of ministers. For instance, in Mexico there were two ministers of education between Solana (1993) and Limón (1994). Thus, for most countries reported, the actual coverage tenure in office is probably lower than indicated by these figures. Vacancies were counted as a change in minister.

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